



Filing ID #10027858

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Tom O'Halleran
Status: Member
State/District: AZ01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2018
Filing Date: 05/15/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Arizona State Retirement System [DB]		Undetermined	Pension Distribution	\$2,501 - \$5,000	<input type="checkbox"/>
BMO Harris Bank Account [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Chase Bank Accounts [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Chicago Teachers Pension Fund [DB]	SP	Undetermined	Pension Distribution	\$15,001 - \$50,000	<input type="checkbox"/>
O'Halleran Commodities Pension and Trust dated 1980 ⇒ Land in Yavapai County, Arizona [RP]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Yavapai County, AZ, US DESCRIPTION: Market Value					
O'Halleran Family Trust ⇒ Primary Personal Residence [RP]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Village of Oak Creek, AZ, US					
Spouse IRA ⇒ Apple Inc. (AAPL) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Spouse IRA ⇒ Cash, Money Market Funds [IH]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Spouse IRA ⇒ Caterpillar, Inc. (CAT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ Freeport-McMoRan, Inc. (FCX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ Newmont Mining Corporation (NEM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ Wheaton Precious Metals Corp Common Shares (WPM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Whole Life Insurace - Mass Mutual [WU]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Spouse IRA ⇒ Wheaton Precious Metals Corp Common Shares (WPM) [ST]	SP	11/29/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Arizona State Retirement System	Pension Payment	\$4,750.00
Chicago Teachers Pension Fund	Pension Payment - Spouse	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2001	Tom O'Halleran and Arizona State Retirement System	Pension plan agreement between Tom O'Halleran and Arizona State Retirement System.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- O'Halleran Commodities Pension and Trust dated 1980
- O'Halleran Family Trust
- Spouse IRA (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Tom O'Halleran , 05/15/2019